

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF LOS ANGELES**

Department LA 9

07/31/2008

Court Convened at: 0830AM

Honorable Commr Reva G. Goetz, Judge Pro Tem  
none, Deputy SheriffAndrea Murdock, Deputy Court Clerk  
S. Brock CSR 10025, Reporter

BP-109096 102 SPEARS, BRITNEY JEAN - TRUST

Trust Proceedings

TRUST - OTHER

Petitioner(s): Taback, Ivan

Attorney(s): Byam, Clark R., Esq. ✓

Continuance Number: 3 Continuance From: 4/17/2008 12:00:00AM

Last Date Changed: 7/21/2008 2:59:42PM

Last Note Changed By: SRILEY

To clear probate notes "filed documents" must be submitted to Rm 258, within time frames set forth in Rule 10.3 of LASC Rules. You may contact the Probate Attorney whose E-Mail address appears at the end of these notes, subject to compliance with all conditions governing the use of Interactive E-Mail. E-mail Rules are available in Rm 258 and on the Court's web site at [www.LASuperiorCourt.org](http://www.LASuperiorCourt.org).

PRIOR ORDERS: Cont to 7/31/08 at 8:30 a.m. <Parties stipulate to Judge Pro Tem> 4/17/08 at 1:30 pm < The temporary orders made on 2/14/08 remains in full force and effect. The PVP appointment is expanded to include the trust proceedings per Probate Code 1470.; Counsel may file and set a Heggstad petition for April 17, 2008.; parties stipulate to Judge Pro Tem >; 3/10/08 at 1:30 pm D-9 < per M.O. dtd 2/14/08 > per order dated 2/14/08 Petnr & Bryan Spears were apptd as acting temp co-tees w/o bond & tee's powers limited as provided in that order

**SUMMARY:**

Petnr is named successor co-tee of IV trust dated 7/26/04  
waivers of ntc by temp tees of estate Wallet and Spears filed  
consents to act filed by petnr & Bryan Spears  
redacted portion of trust attached

**OTHER MATTERS:** BP108870, Conservatorship

**FACTS RE APPOINTMENT OF SUCCESSOR CO-TEES:** trust dated 7/26/04 is revocable - trust provides that Britney is named trustee & if she resigns or otherwise ceases to act then Bryan Spears, Stacy Smith and Ivan Taback may act as successor co-tees (Stacy Smith has declined to act as co-tee)

Trust provides that if settlor/tee shall cease to act if she is under a legal disability or by reason of illness or mental or physical disability, in the written opinion of 2 doctors then practicing medicine, she is unable to manage her affairs

Petnr contends that as a result of crt orders entered re apptmt of temp consor for Britney that court has found that Britney has ceased to act as tee & successor co-tees should be apptd - PC 15643(e) provides that a vacancy in the office of tee exists upon apptmt of a consor of a tee

Trust waives bond for any trustee (Art. 6)

**FACTS RE COMPENSATION FOR LEGAL SERVICES:** Petnr is a resident of NY but is not licensed to practice law in CA - Petnr is a partne with the firm of Proskauer Rose LLP & has offices in LA, CA - atty Mitchell M. Gaswirth assisted with preparation of trust & has been advising petnr since 2/1/08 - Petnr is seeking the right to dual compensation as required by PC 15687(a) - petnr desires to employ Proskauer as counsel for the period 2/1/08 thru 3/17/08 & will compensate firm according to its standard hourly rates for its svcs & reimb out-of-pocket exps - petnr believes employment of such counsel is necessary due to the complexity & sensitivity of issues presented & further, that attys are familiar w/ the trust & consorshp

**RECOMMENDED DISPOSITION:**

Order to be Prepared By:

**RELATED ITEMS:** 101 & #103, 104 & 501 BP108870

Clerk: \_\_\_\_\_ Attorney: \_\_\_\_\_

**SPEARS, BRITNEY JEAN - TRUST****07/31/2008****LA****9****BP-109096****102**

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**MATTERS TO CLEAR:**

- 30 days ntc given to Britney, settlor/bene - see CRC Title 7 Rule 7.51(b), PC 1214
- are there 2 doctors' statements stating Britney is unable to manage her affairs?
- no alleg re name & address of settlor
- are 2 trusts created under this instrument? Any intent to replace Lynne Spears as tee of trust created under para (1) of subdivision (d) of Art 3? supp required
- any restriction in trust instrument re pmt of dual compensation? supp required

**RELIEF:**

- JTD Find that upon apptmt of a general consor that Britney has ceased to act as tee - PC 15643(e)
- JTD appt Petr & Bryan Spears as successor co-tees
- JTD confirm that successor co-tees have all powers conferred by the trust under Art 7 except that: trustees must act only by unanimous consent; shall not sell or lease Britney's personal residence w/o prior Crt order; the situs of the trust shall not be changed & trust shall continue to be governed by CA law & property shall not be removed from CA during temp trusteeship
- JTD auth dual compensation & auth petr to engage Proskauer Rose LLP as petr's counsel for period 2/1/08 to 3/17/08 & to compensate said firm for its svcs at its standard hrly rates

PA's COMMENTS: T/T - o/w if continued, crt to continue auth of temp co-tees?

**Court and counsels confer in chambers, off the record. ON THE RECORD:**

sriley@lasuperiorcourt.org  
SRR 3/10/08

**Geraldine Wyle and Jeryll S. Cohen appear on behalf of petitioner James P Spears.  
Samuel D. Ingham III, court appointed PVP, appears on behalf of Britney Spears.**

**Andrew M. Wallet appears on behalf of himself as co-conservator of the estate. Clark Byam appears on behalf of Bryan Spears and Ivan Taback, co-trustees. Fees to Bryan Spears is reserved to the hearing set for August 14, 2008. \$75,000 shall be paid on account to Ivan Taback's firm.**

**MINUTE ORDER**

<input type="checkbox"/> Granted	<input type="checkbox"/> Denied Without Prejudice	<input type="checkbox"/> Completed	<input checked="" type="checkbox"/> Continued to 8-14-08 at 1:30 PM	<input type="checkbox"/> Submitted	<input type="checkbox"/> Off-calendar
<input type="checkbox"/> As Supplemented	<input type="checkbox"/> Person and Estate	<input type="checkbox"/> No Bond	<input type="checkbox"/> Bond of \$ _____ Additional	<input type="checkbox"/> Will and _____ Codicil(s) Admitted	
<input type="checkbox"/> Full/Limited/No IAEA	<input type="checkbox"/> Lacks Medical Capacity and Voting Capacity	<input type="checkbox"/> PC 2351.5 powers granted	<input type="checkbox"/> Fees Granted in the Amount of \$ _____	<input type="checkbox"/> County/Estate	
<input type="checkbox"/> Dementia Powers Granted	<input type="checkbox"/> Medical and Placement	<input checked="" type="checkbox"/> Parties stipulate to Judge Pro Tem <del>written</del>	<input type="checkbox"/> Supplemental Probate Investigator/DCFS Report Ordered	<input type="checkbox"/> Bond Exonerated	
<input type="checkbox"/> Court has Read and Considered/Approved Report		<input checked="" type="checkbox"/> Court Investigation/DCFS/Regional Center Report is placed in the Confidential Envelope / is admitted into evidence as Court's Exhibit 1 and sealed	<input type="checkbox"/> Give Notice Waived	<input type="checkbox"/> No further review required	
<input type="checkbox"/> PVP/Attorney/Citee/Party Ordered Back/Discharged/As Prayed	<input type="checkbox"/> Appearance of Minor(s)/counsel waived for next hearing		<input type="checkbox"/> PVP Appointed/Remains/Discharged		
<input type="checkbox"/> New Citation to issue/personal service	<input type="checkbox"/> Re: if proof of deposit to a blocked account filed				
<input type="checkbox"/> Confirmed for \$ _____, Commissions: _____, Title: _____					
<input type="checkbox"/> Time to Administer Estate // Special/Temporary Letters Extended/Granted to _____					
<input type="checkbox"/> Accounting to be filed by _____ and Set for Hearing on //Statue re: Accounting/Status Hearing is Set for _____					

**RECOMMENDED DISPOSITION:**

Order to be Prepared By:

RELATED ITEMS: 101 & #103, 104 & 501 BP108870

Clerk: \_\_\_\_\_ Attorney: \_\_\_\_\_

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